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CONTROL OF CONFERENCE ATTENDANCE AND TRAVEL EXPENSE

*How do cities plan and control the attendance at professional conferences for city employees? How are travel expenses authorized and controlled?*

This report surveys the extent to which selected cities send municipal officials and employees to conferences of professional organizations at city expense. It also outlines the procedures for budgeting, authorizing, and controlling the expense for travel to and attendance at conferences.

The material for this report was obtained from questionnaires sent to 23 cities — one over 500,000 population, 13 from 100,000 to 500,000, and nine from 20,000 to 100,000. These cities are listed at the end of this report. This report supplements MIS Report No. 79, *Travel and Auto Allowances*, issued in August, 1950, by reviewing the practices of selected cities particularly with respect to budgetary planning and expenditure control.

Attendance at Conferences

With the development of professionalism in most phases of municipal government and the corresponding development of professional organizations of municipal officials, there has come widespread recognition that cities as well as employees benefit by the exchange of information on procedures, practices, and policies concerning particular phases of municipal administration.

The various programs, activities, and services of the major organizations of and for municipal officials are described in MIS Report No. 149, *Professional Organizations of Municipal Officials*, issued in June, 1956. One of the functions of these organizations, the conference, provides a working ground for the exchange of information. Many cities therefore have assumed the expense of their representatives for travel to and attendance at these professional meetings.

Who Attends Conferences? Of the 21 cities reporting, the number of city officials and employees sent to meetings of professional organizations in the past year ranged from eight from Greenville, South Carolina, to 135 from Kansas City, Missouri. Six cities reported sending from eight to 15 employees; six from 20 to 25; three from 38 to 40; three, 50; two, 96; and one city, 135. The survey returns showed almost no correlation between city population and the number of employees sent to conferences.

Table 1 shows the number of cities sending the specified officers to one or more national, regional, and state meetings. The first column shows the number of cities that have the officials indicated. The next three columns show the number of cities sending the indicated official to one or more national, regional, and state meetings. All 22 cities with the council-manager plan, for example, sent the manager to one or more national and state meetings. Table 1 shows that the highest ratio of attendance at national meetings occurs for city managers, public works directors and city engineers, finance directors and other finance officers, police chiefs, fire chiefs, recreation directors, and park superintendents. In addition to the employees listed in Table 1, a number of cities reported sending health, public welfare, and building employees to state, regional, and national conferences.

While smaller cities may find it desirable and feasible only to send department heads to conferences of professional organizations, larger cities may find it necessary to send a greater number



Table 1  
Number of Cities Sending Officials to One or More Conferences

City Official	No. Cities with Office	No. of Cities Sending Official to Meetings		
		National	Regional	State
City Manager . . . . .	22	22	9	22
City Clerk . . . . .	23	13	5	13
Public Works Director and City Engineer . . . . .	23	21	13	17
Personnel Director . . . . .	18	12	5	11
Finance Officer <sup>1</sup> . . . . .	22	18	9	18
Purchasing Agent . . . . .	18	12	4	5
City Librarian . . . . .	18	12	7	10
Police Chief . . . . .	23	20	14	18
Fire Chief . . . . .	23	18	14	17
Recreation Director . . . . .	18	16	9	14
Planning Director . . . . .	21	14	9	15
Parks Superintendent . . . . .	20	16	6	14
City Attorney . . . . .	23	12	3	18

<sup>1</sup>Includes comptrollers, auditors, and treasurers.

of employees at various levels. Cincinnati reports sending assistants of top officials to professional conferences. Kansas City and Rochester, New York, report sending middle level supervisors.

Richmond, Virginia, sent 96 employees and officials to state, regional, and national meetings and submitted a detailed list naming the employees sent to conferences at city expense and enumerated the number of conferences each attended at the state, regional, and national level. The number of employees sent to public works conferences indicates the number and level of professional employees that a large city deems necessary to send at city expense for city benefit.

City Employee	National Meetings	Regional Meetings	State Meetings
Director of Public Works . . . . .	1		1
Assistant Director of Public Works . . . . .	1		1
Chief — Street Sanitation . . . . .			1
Chief — Operations . . . . .	2		2
Chief — Sewer Maintenance . . . . .	1		2
Chief — Street Maintenance . . . . .	1		1
Chief of Design . . . . .	1		1
Airport Manager . . . . .	1	1	
Sewage Treatment Engineer . . . . .	1		
Chief — Preliminary Engineering . . . . .			1
Civil Engineer 2 . . . . .	2		
Civil Engineer 2 . . . . .	1		
Foreman — Street Maintenance . . . . .			1

Control of Conference Attendance. Some cities control attendance by limiting attendance at a particular meeting to one employee or by limiting the number of conferences that an employee can attend during one year. Three of the reporting cities — Fort Lauderdale, Florida; North Adams,



Massachusetts; and Greenville, South Carolina — limit the number of employees representing the city at any out-of-town meeting to one.

Seven cities limit the number of conferences that an employee or official can attend during one year. These cities are: Berkeley, California; Fort Lauderdale, Florida; Peoria, Illinois; North Adams, Massachusetts; Rochester, New York; Toledo, Ohio; and Greenville, South Carolina. All seven of these cities limit attendance at national meetings to one. Attendance at regional meetings is limited to one meeting by three cities, one or two by one city, not limited by one city, and two cities did not report. Attendance at state meetings is limited to one meeting by four cities, to two by one city, and to six by one city. One city indicated no limitation for state meetings.

### Planning and Control of Travel Expense

Authorization of travel for conference attendance is based upon the benefit that the city receives from employee and official representation. The assumption of the cost of travel strives to give fair treatment to the traveling employee and at the same time to disperse city funds efficiently.

Seventeen of the 23 cities reported that they have procedures for the control of travel expenses in the forms of rules and regulations, budgetary instructions, or administrative procedures. Seven cities submitted written rules and regulations, and budgetary instructions were available from two additional cities. These rules, regulations, and instructions include listings of reimbursable items of travel expense, allowances for approved means of transportation, and other authorized items of expense, and procedures for obtaining proper authorization for travel and reimbursement of expense.

### Reimbursable Items

Table 2 gives some indication of the expense items allowed by eight cities which submitted this information through travel regulations or budgetary instructions. The only expense items specifically forbidden are tips, laundry, and dry cleaning (Oakland, California, and Greenville, South Carolina). The following discussion is based on provisions in the eight cities shown in Table 2.

Table 2  
Expense Items Allowed by Eight Cities

City	Trans- portation	Hotel	Meals	Tips	Cab	Tel. & Telegraph	Registra- tion Fees	Laundry, Cleaning
Long Beach, Calif. . .	YES	YES	YES	YES	YES	YES	YES	YES
Oakland, Calif. . . . .	YES	YES	YES	NO	YES	YES	... <sup>1</sup>	NO
San Diego, Calif. . . .	YES	YES	YES	... <sup>1</sup>	YES	... <sup>1</sup>	YES	... <sup>1</sup>
Flint, Mich. . . . .	(No list of reimbursable expenses as such. Travel regulations state that all expenses incurred on city business are allowed except items constituting personal expense such as laundry, valet, etc.)							
Kansas City, Mo. . . .	YES	YES	YES	YES	YES	YES	YES	... <sup>1</sup>
Rochester, N. Y. . . .	YES	YES	YES	... <sup>2</sup>	YES	YES	YES	... <sup>2</sup>
Greenville, S. C. . . .	YES <sup>3</sup>	YES	YES	NO	... <sup>1</sup>	... <sup>1</sup>	... <sup>1</sup>	NO
Richmond, Va. . . . .	YES	YES	YES	YES	YES	YES	... <sup>1</sup>	YES

<sup>1</sup>Item not mentioned in regulations governing travel.

<sup>2</sup>In addition to the checked items, 15 per cent of cost of lodging and meals is allowed for unlisted expenses.

<sup>3</sup>Only one-half of the transportation expense reimbursed beyond 750-mile radius of the city.



Transportation Allowances. Allowable methods of transportation and the standards for the reimbursement of expense consume more detailed instructions than do other items of travel expense. In many cases provisions for transportation state that the employee may choose the method of transportation, but reimbursement will be based upon the means most economical to the city. Thus the determination of the most economical means of transport for each individual case of travel is left to the administration.

Flint, Michigan, for example, provides: "Each traveler shall be permitted to select his own method of transportation on out-of-town travel but reimbursement will be made on the basis most economical to the City unless the method of transportation is directed by the Department head for the purpose of expediting City business."

Other cities provide reimbursement on the basis of the cost of transportation within certain areas of mileage. Kansas City provides an example in requiring that "Transportation expense for destinations more than 300 miles from Kansas City will be based on the round-trip cost of airplane travel. City employees may use any suitable means of transportation on official trips, but the maximum travel allowance will be the round-trip plane fare. The maximum travel allowance for destinations of 300 miles or less from Kansas City will be the cost of a round-trip railroad ticket excluding the cost of berths, or 7¢ per mile if a private automobile is used. In either case, reimbursement for meals is limited to a maximum of \$9 per day. City employees are urged to pool transportation facilities on short trips."

Long Beach, California, details allowances for each type of transportation. First class rates with pullman and roomette accommodations for overnight travel are allowed in case of travel by rail; round-trip air fare is allowed if air travel is approved by the city manager in advance; reimbursement on the basis of round-trip, tax exempt rail fare is allowed when private cars are used, but there is no allowance for other expenses of private automobile travel not incident to other methods of travel; and rental rates and gas coupons are allowed for travel by city vehicles.

All cities specify reimbursement for public conveyances on the basis of the federal transportation tax exemption allowed municipalities.

Meals. Monetary limitations are made for meals by per meal or per diem. Rochester has a per diem allowance for meals of \$8 or in cases where travel consumes part of a day, \$1.25 for breakfast, \$2.50 for lunch, and \$4.25 for dinner. Oakland with a per diem allowance of \$6.50 allows \$1.50 for breakfast, \$1.75 for lunch, \$3.25 for dinner, and the actual cost of meals at officially authorized conferences luncheons and dinners. San Diego has a uniform limit of \$2 per meal. Kansas City allows \$9 per diem for meals in transit, while allowing a per diem rate of \$15 to include hotel room, meals, tips, taxi, and other expenses at the employee's destination.

Long Beach regulations do not fix per diem rates for the reimbursement of expenses, but a maximum rate is established for meals at \$7.50 per day. The city manager's office normally will not approve reimbursements in excess of this amount unless proof is shown that special banquet items or the like justify payment of an increased amount.

Lodging. In all cases receipts are required in support of lodging expenses. In addition, San Diego and Oakland allow \$9 per night for lodging, and as mentioned, employees traveling under the rules and regulations of Kansas City must stay within the allotted \$15 for lodging, meals, and other expenses or personally assume the additional cost.

Other Expenses. Tips, laundry, telephone, taxicab fares, and other expenses are treated differently by the reporting cities. Richmond allows reimbursement for tips and taxicabs and for laundry if the travel lasts the extent of a business week. All other expenses must be justified by written explanations and receipts where obtainable. Kansas City allows the reimbursement of tips, telephone, and taxicab fares. Rochester allows reimbursement of other expenses than taxi, telephone, transportation, lodging, and meals at an amount not exceeding 15 per cent of the cost of lodging and meals. Unusual expenses must be accompanied by a receipt and an explanation.

Long Beach allows taxi fare, official telephone and telegraph expense, and tips not to exceed 10 per cent of meal cost. Laundry, dry cleaning, public stenographer fees and other expenses are




Figure 2

1. DEPT.		<b>TRAVEL REQUEST</b> fiscal year _____			CITY OF SAN DIEGO FORM 1312 REV 1/54	
2. TRAVEL BY				3. TITLE		
4. PURPOSE OF TRIP						
5. DESTINATION					6. DATE OF MEETING	
7. OFFICIAL NAME OF MEETING						
8. METHOD OF TRAVEL <input type="checkbox"/> CITY VEHICLE <input type="checkbox"/> PRIVATE AUTO <input type="checkbox"/> TRAIN		9. DATE OF DEPARTURE		10. DATE OF RETURN		
SEE BUDGET INSTR. FOR CURRENT TRAVEL ALLOWANCES						
11. BUDGET DETAILS		UNITS	RATE	AMOUNT	BUDGET OFFICE	
A. LODGING			\$	\$	\$	
B. MEALS						
C. TRANSPORTATION						
D. OTHER (SPECIFY)						
(1)						
(2)						
(3)						
(4)						
(5)						
12. ESTIMATED TOTAL EXPENSES				\$	\$	
13. REMARKS						
SIGNED _____					DEPT. HEAD _____	
14. BUDGET OFFICE USE ONLY					15. APPROVED	
16. REF. NO.	17. DESTINATION	18. MEETING	19. DATE	20. NO. PERS.	21. DEPT. EST. EXPENSES	22. BUDGET OFFICE

Figure 3

INSTRUCTIONS: SEE AR 3-6, MAKE OUT PART I IN THREE COPIES, FILE WITH CITY MANAGER. AFTER APPROVAL RETAIN TWO COPIES TO FILL IN PART II FOR REIMBURSEMENT.		5F-59 CITY OF LONG BEACH		DATE: _____ BUDGET NO. _____					
<b>TRAVEL REQUEST and EXPENSE REPORT</b>									
<b>PART I. TRAVEL REQUEST</b>									
1. REQUESTING OFFICIAL		2. TITLE		3. DEPARTMENT					
TRAVEL AUTHORIZATION IS REQUESTED FOR: (IF OTHER THAN REQUESTING OFFICIAL)									
4. NAME		5. TITLE		6. DEPT./DIVISION					
7. EXPLANATION OF TRAVEL REQUEST:					8. AMOUNT REQUESTED (See Item 13)				
9. I BELIEVE THIS TRIP TO BE NECESSARY AND BENEFICIAL TO THE CITY OF LONG BEACH  _____ DEPT. HEAD		<b>APPROVALS</b>							
10. CITY MANAGER APPROVED IN THE AMT. OF \$ _____  _____ CITY MANAGER		11. APPROVED BY CITY COUNCIL  _____ DATE		\$ _____ MAX. AMT.					
<b>PART II. EXPENSE REPORT</b>									
INSTRUCTIONS: FILL OUT ONE COPY, ATTACH TO DIRECT PAYMENT REQUEST, FILE WITH CITY ACCOUNTANT PAYMENT SECTION WITHIN FIVE WORKING DAYS AFTER RETURN. ATTACH ALL RECEIPTS FOR HOTEL, TRANSPORTATION, AND OTHER ITEMS.									
12. EXPENSE CATEGORY		13. ESTIMATED TOTALS	14.					15. TOTALS	
			SUN.	MON.	TUE.	WED.	THUR.	FRI.	SAT.
DATES	1st WEEK								
	2nd WEEK								
TRANSPORTATION (Check one) <input type="checkbox"/> Rail <input type="checkbox"/> Air <input type="checkbox"/> Priv. Car  GARAGE  TAXIS/CAR FARE  LODGING  TELEPHONE & TELEGRAPH  TIPS AND GRATUITIES  REGISTRATION FEES  MEALS ( BREAKFAST LUNCH DINNER OTHER MEALS MISCELLANEOUS (Specify)									
TOTALS									
16. I CERTIFY THAT THE FOREGOING EXPENSES WERE INCURRED IN THE CONDUCT OF CITY BUSINESS.  _____ REQUESTEE			17. APPROVED:  _____ DEPT. HEAD						
			_____ DATE						





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